

SOUTH CAROLINA COMMISSION ON HIGHER EDUCATION CAPITAL FUNDING GOALS FOR PUBLIC HIGHER EDUCATION INSTITUTIONS

The following goals have been formulated to guide the Commission on Higher Education in making capital funding recommendations to the Governor and the General Assembly.

STATEWIDE GOALS

- To ensure campus health and safety by supporting projects designed to remedy existing issues that adversely affect human well being
- To address critical deferred maintenance needs of the institutions, thereby protecting the State's capital investment in higher education
- To alleviate problems resulting from critical enrollment and/or programmatic growth, including needs for state-of-the-art academic space
- To support needs that are significant to continuing economic development in the state or service area

Points will be assigned on related standards and rating criteria. A maximum of 100 points may be generated through related standards and a maximum of 100 points may be generated through the rating criteria. Projects will be rated according to the total combined number of points generated up to a maximum of 200 points.

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SECTION I – RELATED STANDARDS

Each proposed project will be reviewed and rated for consistency and compatibility with the following related standards:

- ❖ **STANDARD 1.** The degree to which the proposed project is critical and central to the institution's approved mission. (up to 24 points)

➤ EVALUATION

- a. Evaluated against approved mission statement augmented by institution data if available.

- ❖ **STANDARD 2.** The degree to which the proposed project's ultimate outputs (e.g., degrees awarded by discipline, number of graduates, type and volume of research, etc.) are adding critical capacity and functionality to address defined state needs. (up to 24 points)

➤ EVALUATION

- a. Academic space per FTE and/or Sq Ft of research space per research \$ expended, augmented by institutional data if available.
 - i. Equal to or under standard plus confirming documentation = 24
 - ii. Equal to or under standard but no confirming documentation = 20
 - iii. Over standard plus confirming documentation = 20

- iv. Deferred Maintenance, multiple buildings = 12
- v. Over standard but no documentation or documentation N/A = 0

❖ **STANDARD 3. The degree to which the need for the quantity and type of space can be defended through the application of objective space analysis, including space guidelines and appropriateness of offerings. (up to 20 points)**

1. EVALUATION

- a. Measured against fall 2006 space factor for classroom utilization, augmented by institutional data if available (studies showing that additional space or different space is needed)
 - i. Under standard plus confirming documentation = 20
 - ii. Over standard plus external documentation of library deficiencies = 20
 - iii. Over standard plus confirming documentation = 12
 - iv. Under standard, no documentation = 10
 - v. Deferred Maintenance, multiple buildings = 6
 - vi. Over standard but no documentation or documentation N/A = 0

❖ **STANDARD 4. The degree of non-capital improvement bond funding included in the project and/or documented savings and/or operational cost increase avoidance. (up to 12 points)**

1. EVALUATION

- a. Information from CPIP, augmented by data provided by institution if available
 - i. Documented external funding of 25% or more + operational savings = 12
 - ii. Documented external funding of 25% or more of total request = 10
 - iii. Documented external funding <25% = 8
 - iv. Expected operational savings only = 6
 - v. Deferred Maintenance, multiple buildings = 6

❖ **STANDARD 5. The proposed project is consistent with the institution's Facilities Master Plan. (up to 10 points)**

1. EVALUATION

- a. Verification that project is included in master plan and how it relates to the overall plan
 - i. Both verifications = 10
 - ii. One of the above = 7

❖ **STANDARD 6. Documentation that all alternatives have been explored and that the proposed remedy is the best option available. (up to 10 points)**

1. EVALUATION

- a. Documentation included in CPIP – 10
- b. Information from CPIP – i.e., if renovation possible but not considered in new construction – 5

Maximum Points for Standards = 100

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SECTION II – RATING CRITERIA

❖ HEALTH & SAFETY (up to 25 points)

1. **The degree to which an existing condition can be documented to be unsafe and unhealthy for human well being.**

➤ **EVALUATION**

- a. Verified by external study or institutional evaluation:
- i. Air quality issues or code issues accepted previously (no external study) = 5.00
 - ii. Air quality, or other code issues (external study) = 6.00
 - iii. Citations for air quality, serious code issues or serious life safety issues (external study) = 8.34*

**(to qualify for points in 2 & 3 below, institution must receive maximum here)*

2. **The appropriateness of the proposed solution to the defined health or safety issue.**

➤ **EVALUATION**

- a. Direct institutional verification or in CPIP (only if maximum points in 1a)

3. **The degree that the institution's and the State's well being would be adversely impacted through discontinuance of activities if the defined health and safety issues are not addressed.**

➤ **EVALUATION**

- a. Information from CPIP, studies on file at CHE, and institutional documentation if provided (only if maximum points in 1a)
- i. Institutional verification that activities could not be conducted in alternate facilities so as to require discontinuance/or deferred maintenance = 8.33

❖ DEFERRED MAINTENANCE (up to 25 points)

1. **The degree to which the proposed project addresses deferred maintenance needs as reported in the institution's CHEMIS submission using a rolling average over the most recent three-year period.**

➤ **EVALUATION**

- a. Information will be obtained from Building Data Summary, generated by CHEMIS. Points assigned based on range of building condition codes (below):

<u>Building Condition Code</u>	<u>Points Assigned</u>
90-100	0
80-89	5
70-79	10
0-69	12.5
Infrastructure/Def. Maint. (multiple buildings)	12.5
New Construction or N/A	0

2. **The degree to which the institution's expenditures for building maintenance compare with the amount generated for building maintenance¹ in the MRR (according to the percent funded) using a rolling average for the most recent three-year period.**

➤ **EVALUATION**

- a. Institutions report amount expended for routine maintenance (from any source) for E&G Buildings. Data will be compared with the amounts generated by MRR (at the percent funded) and averaged for the most recent three-year period.
 - i. Expenditure for E&G maintenance equal to or greater than MRR estimates = 12.5
 - ii. Expenditure not reported but data for estimate available to CHE = 12.5
 - iii. Expenditure less than MRR estimate or not reported and estimate not available = 0

❖ **ENROLLMENT & PROGRAMMATIC GROWTH (up to 25 points)**

1. **The degree to which a space shortage can be objectively supported through space analysis – both on an institutional macro level as well as the micro level of a particular program.**

➤ **EVALUATION**

- a. Data to be supplied by institution
 - i. External confirming documentation/data = 12.5
 - ii. Internal confirming documentation/data = 10
 - iii. Deferred Maintenance = 5
 - iv. None Reported or N/A = 0

2. **The degree to which the need for the outputs of the additional proposed space cannot be met through alternative delivery systems (e.g., distance learning technologies, etc.).**

➤ **EVALUATION**

- a. Data to be supplied by institution, if applicable.
 - i. If none can be met based on program of study or deferred maintenance = 12.5
 - ii. If all dedicated to distance learning = 12.5.
 - iii. If can be partially met = 8.5
 - iv. No documentation or N/A = 0

❖ **ECONOMIC DEVELOPMENT (up to 25 points)**

1. **The degree to which the proposed project can be shown to be consistent with the State's and/or service area's priorities for continuing economic development as defined by appropriate economic development entities (e.g., State, Local, or Regional Departments of Commerce).**

➤ **EVALUATION**

- a. Documented evidence – 8.34

2. **The degree to which the proposed project is a critical component of an articulated State, regional, or community comprehensive economic development plan.**

➤ **EVALUATION**

- a. Documented evidence – 8.33

3. **The degree to which the proposed project can be shown to be consistent with the State's and/or service area's priorities for continuing economic development as defined by appropriate economic development entities (e.g., State, Local, or Regional Departments of Commerce).**

➤ **EVALUATION**

- a. Documented evidence of funding amounts– 8.33

Maximum Points for Rating Criteria = 100

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❖ **OTHER CONSIDERATION – Essential Sequencing of Multiple Projects**

Projects that require a phasing sequence with other projects in the ranking list will be listed in the order required. An example of a phasing requirement would be a utility plant expansion request that would need to be completed before a new building request could come online due to insufficient existing utilities capacities. If the rankings established by the process outlined in this document do not place projects in the appropriate phasing sequence, then the project rankings will be revised accordingly. This would be accomplished by ranking all other projects involved in the phasing sequence behind the initial project. If the second project has a higher percentage point total, then it will be moved to immediately after the first project. The rationale would continue for the third and subsequent projects as necessary. *(This may be used for projects that have received partial funding and for which the institution can document a continuing critical need and/or to differentiate between projects that have the same scores.)*

If applied, based on previously funded by CIB = 2 to 5 additional points, based on documented CIB amounts

*If percentage of previous amount funded is greater than 25% of the current request = 5

*If percentage of previous amount funded is less than 25% of the current request = 2

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¹**Building Maintenance** is defined as the cost (including salaries, wages, supplies, materials, equipment, services, and other expenses) necessary to keep a building in good appearance and usable condition and prevent the building from deterioration once it has been placed in first class condition for that type and age of building. It does not include Auxiliary Enterprise buildings. Building Maintenance includes minor repairs and alterations, costs of materials, hire of personnel, and other necessary expenses for the repair and/or painting of the following: roofs, exterior walls, foundations, flooring, ceilings, partitions, doors, windows, plaster, structural ironworks, screens, windows shades, blinds, plumbing, heating and air conditioning equipment within or a part of the building, electric wiring, light fixtures (including the replacement of lamps), washing of all outside window surfaces, built-in shelving, and other related items.